



Estate Planning Checklist

Information you need to get a plan under way

Gather this key information and regularly update the list for your loved ones.

- A listing of the property that you own, with copies of the recorded deeds.
- Updated list of vehicles owned with titles.
- A listing of your bank accounts and investment accounts with account numbers and contact information.
- A listing of retirement plans, life insurance and other investment vehicles, again with contact information.
- The date and location of your Last Will and Testament, Living Trust and Health Care directives.
- A statement about organ donation, if you have exercised that option.
- A summary of your funeral arrangements, including cremation requests, place and type of funeral service, burial site, memorial contributions, and type of monument or marker.
- Credit cards and debt obligations.
- A listing of all memberships and organizations.
- Sources of regular income, such as social security or pension.
- List of all device and account passwords.
- A medical history.
- Information about your life, including schools attended, employment history, groups or organization that you've been involved in and hobbies.
- Storage location of previous years' tax returns.

